

## Session 8: Module 2 - Scheduling Appointments

### SCRIPT

Description	Text
1. Introduction	<b>Welcome</b> to M-SPIRIT <b>Session 8, Module 2</b> , of the M-SPIRIT Required Online Training presented by the Montana Department of Public Health and Human Services WIC Program.
2. Start	Appointments
3. <appt>	In the last module, we showed the whole screen to help familiarize you with how it looks and functions.
	However, in this module, we are going to return to the actual size of the screen, which means our recorder is again limited to just showing sections of the screen and not the whole screen at one time.
	In previous modules, we've indicated when we've had to "pan down" to show another portion of the screen.
	However, in this module we will be using directional arrows to indicate a shift in the recorder's view.
4. <appt1>	Today is 12/2 and we are going to schedule some appointments for the Cookie family, whom we've prescreened over the phone.
	They are not able to come today but can tomorrow.
	Go ahead and open tomorrow's schedule.
5. <appt2>	<no script>
6. <appt3>	Since Mama is already the default Member, click on the Appt Type drop-down.
7. <appt4>	We are going to schedule an appointment for Mama by selecting INITIAL CERTIFICATION from the list.
8. <appt5>	The appointment request was made via a phone call, so let's select the By phone radio button.
9. <appt6>	We are going to type a comment. Click into the Comments text box.
10. <appt7>	<no script>
11. <appt8>	It's been a couple of minutes since we first opened this screen.
	The REFRESH button is especially important for agencies that may be scheduling a high volume of appointments at one time, such as those doing same-day scheduling or that have a lot of CPAs working simultaneously.
	It functions to force the system to update any changes made to the screen while it's been open.
	This minimizes the potential for overbooked appointment times.
	We will take a look at the overbook functionality in a few minutes.

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	In general, it's a good idea to click the REFRESH button before scheduling an appointment, so let's go ahead and click it.
<b>12. &lt;appt9&gt;</b>	Mama prefers afternoon appointments and would like to come in at 1:00.
	There are two ways to schedule an appointment.
	We can double-click on the block of time when the appointment should start or...
	...we can single click and click OK.
	Let's double-click on the 1:00 appointment in the first column.
<b>13. &lt;appt10&gt;</b>	The Confirm Appointment Selection window opens.
	It reiterates the appointment information including the participant name, appointment type, the clinic the appointment is scheduled at, the participant's WIC Category, the date of the appointment, the time the appointment begins and when it will end, and the resource or staff column the appointment was scheduled under.
	We can, also, choose to create an appointment notice at this time.
	We could click the Cancel button if we didn't want to finish making this appointment.
	To complete the scheduling process, we can click the OK button, or since it's highlighted and active, we can simply press the Enter key on our keyboard.
	Let's press the Enter key or click OK.

<b>14. &lt;appt11&gt;</b>	Let's schedule another appointment, this time for Ginger.
	To schedule an appointment for another family member, we simply need to change the Appointment Information.
	Click on the Member drop-down.
<b>15. &lt;appt12&gt;</b>	Click on Ginger.
<b>16. &lt;appt13&gt;</b>	<no script>
<b>17. &lt;appt14&gt;</b>	Notice the WIC Category has automatically changed to Child once we selected Ginger.
	Next, we need to select the appropriate Appointment Type. Click on the drop-down.
<b>18. &lt;appt15&gt;</b>	Since Ginger is also new to the WIC Program, we are going to select INITIAL CERTIFICATION.
<b>19. &lt;appt16&gt;</b>	Again, the Duration defaults to the amount allotted for this type of appointment.
	Notice that the Contact Type and the Comments field have not reverted back to the default or cleared.
	The Contact Type of By phone still applies but...
	...we want to clear the Comments field.
	Click into the field and we will highlight and delete the text.
<b>20. &lt;appt17&gt;</b>	Go ahead and press the Delete key on your keyboard.
<b>21. &lt;appt18&gt;</b>	We are almost ready to schedule Ginger's appointment.
	What should we do first?
	Yep. Click REFRESH.
<b>22. &lt;appt19&gt;</b>	We want to schedule Ginger in the same column so that her appointment is with the same resource, or staff.
	We also want her appointment to be in the next time slot, which starts at 2:00.
	We said there are two ways to schedule the appointment: double-click the time slot when the appointment is supposed to start or single click and click OK.
	But what happens if we forget to select our time slot and just click OK?
	Let's try it. Click the OK button.

<b>23. &lt;appt20&gt;</b>	In general, we can assume the information on the confirmation screen is correct and that the appointment is going to be scheduled when and where we want it to be.
	But, remember, we didn't select our time slot...
	...so, how did we manage to schedule an appointment?
	Well, the system automatically selects the first appointment available for that day when a time slot isn't selected.
	Let's pretend we are happy keyboarders who didn't bother to look at the confirmation window and press the Enter key.
<b>24. &lt;appt21&gt;</b>	Ginger's appointment is now scheduled for 8:00 a.m....
	...which is easy enough to resolve by simply deleting the appointment.
	The Delete Appt button becomes enabled only once an appointment is selected by clicking on the time slot when the appointment starts.
	Go ahead and click on the 8:00 time slot.
<b>25. &lt;appt22&gt;</b>	Click the Delete Appt button.
<b>26. &lt;appt23&gt;</b>	The prompt verifies that we want to delete the 12/3 appointment for 8 AM. Click OK.
<b>27. &lt;appt24&gt;</b>	This time, let's single-click on the 2:00 time slot...
<b>28. &lt;appt25&gt;</b>	...and click the OK button.
<b>29. &lt;appt26&gt;</b>	This appointment is for 2:00. Press the Enter key or click OK.
<b>30. &lt;appt27&gt;</b>	Let's take a look at the overbook functionality.
	Select Honey from the Member drop-down.
<b>31. &lt;appt28&gt;</b>	<no script>
<b>32. &lt;appt29&gt;</b>	<no script>
<b>33. &lt;appt30&gt;</b>	Overbooking is scheduling more than one appointment on the same date at the same time for the same resource.
	It can occur unintentionally when multiple staff are scheduling appointments at the same time and the screen hasn't been refreshed so that you can't tell that someone has already scheduled an appointment at that time and for the same resource before you were able to do so.
	We can also intentionally overbook by selecting a time and resource that already has an appointment scheduled.
	Go ahead and double-click on the 2:00 appointment time slot for which Ginger is already scheduled.

<b>34. &lt;appt31&gt;</b>	The overbook prompt informs you that the resource has other appointments already scheduled during the selected time on this date...
	...and that continuing, or clicking OK, will result in the resource being overbooked.
	The Cancel button stops the scheduling process.
	Let's click OK and see what happens when an overbook is created.
<b>35. &lt;appt32&gt;</b>	Press Enter or click OK on the confirmation message.
<b>36. &lt;appt33&gt;</b>	When a resource is overbooked, a second column is created for that same resource beside the original column...
	...and any overbooked appointment(s) display in red.
	Let's see what happens if we try to schedule an appointment in the overbook column at a time when the original column doesn't have an appointment.
	Double-click on the 2:30 time slot under Honey's appointment.
<b>37. &lt;appt34&gt;</b>	The confirmation message tells us the appointment is for WIC 1 BM at 2:30.
	Press Enter or click OK.
<b>38. &lt;appt35&gt;</b>	Notice the appointment was scheduled in the original Resource column.
	Appointments will only be scheduled in the overbook column if there isn't an opening in the original Resource column.
	OK. Go ahead and delete both of the appointments for Honey, starting with the 2:30 appointment in the original Resource column.
<b>39. &lt;appt39&gt;</b>	<no script>
<b>40. &lt;appt40&gt;</b>	<no script>
<b>41. &lt;appt41&gt;</b>	<no script>
<b>42. &lt;appt42&gt;</b>	<no script>
<b>43. &lt;appt43&gt;</b>	<no script>
<b>44. &lt;appt43A&gt;</b>	As with most displays in M-SPIRIT, when the text is truncated due to display limitations, you can view its entirety by holding your cursor over the text.
<b>45. Questions</b>	Do you have any questions about what we just reviewed? If so, please submit them via the M-SPIRIT Frequently Asked Questions forum on the Montana WIC website.